	Backlog cases currently in progress	Incoming cases currently in progress (completion by 3/24?)
Fate		
Ex. 6 Personal Privacy (PP)	None	None
	P-19-0041-44; P-18-0172; P-18-0408; P-18-0409	P-19-0165 - other disciplines in discussion with submitter; may not be complete by 3/24
	P-19-0131- should be complete by 3/27. Challenge was to figure out scope of fate work which took several conversations with the health assessor to determine. Goal not clearly defined	None
Eco		
Ex. 6 Personal Privacy (PP)	P-18-0173; L-19-0213; P-18-0173; P-18-0256; P-18-0408c; P-18-0318c- awaiting either fate or exposure updates for these cases	None

Typical tracking of your cases	How to track real updates during case review?
-	Relational database or NCR- been investigating options for translating [redacted]'s spreadsheet into an interacture structure that could be updated and would send notifications when other disciplines have completed their work
Incoming- personal records for calls for cases Dedicated PMNs- Ex. 6 Personal Privacy (PP) spreadsheet	Master tracking system, whether it's confluence, access database, or excel spreadsheet. Need to have a central location that everyone uses and knows to fill out so that the next discipline can be notified appropriately
Assigned SIF through Ex. 6 Personal Privacy (PP) Tracked via personal notes or calendar. Typically do not have many assignments so not much tracking is needed other than meeting deadline. All parties are notfified when SIF is completed	Authoriative spreadsheet or e-mail notification
PMN Dedicated eco team has internal tracking table that is shared on CBI side. Used to track all cases for which an email is received (even if the email is for engineering). Cases that are specifically assigned to an assessor are added to this table to allow tracking of the recent history of cases.	Either an email update or an update system where disciplines can be notified will be helpful

Changes for easier tracking and improved communication about case status?
Move away from excel files and to relational database or NCR
Need a list of specific cases to work on each week. Need a notification system to alert other disciplines when the case is ready for their assessment. Have a user friendly interface that can be used by multiple people. Access database is preferred, but may take some time to get it up and running
A master spreadsheet that assessors and PMs can access and update as they complete their assignments
If all disciplines can reply to the original email or creatin or an email/notification system that differentiates between requests. It would be helpful to know and track what the changes are that are happening to a case. Responding to the original email will provide some history on the case which will be helpful for disciplines downstream, especially in cases where [redacted] requests a change after cases are "finalized." Can facilitate quicker process if it is clearly defined which discplines need to rework

Recurring Themes
Most cases that are currently being worked on should be done by 3/27 Individual assessors have their own internal tracking method Master spreadsheet or tracking system is necessary Access Database as a tracking system Emphasis on a system that allows notification of the next discipline
One case should be done by 3/27, other cases require info from submitters or other disciplines before eco can work on them Currently using discipline-specific tracking table

Ex. 6 Personal Privacy (PP)	P-16-0349- finishing up a data review memo. Will need an update to exposure after, so hopefully this can be complete by the end of this week or next week. P-20-0018-0021- scheduling submitter meeting P-19-0041-0044- may need another meeting with submitter	None
Exposure		
Ex. 6 Personal Privacy (PP)		
	P-19-0136; P-18-0143; P-20-0031; L-20-0060. The P-cases should be done this week. Wait for assignments from emails from other disciplines. Challenge: whether contractors will be able to run PMNs remotely	Same as previous cell
Engineering		
Ex. 6 Personal Privacy (PP)	P-19-0041c: had conference call with submitter and now awaiting submitter info Friday 3/27 L-18-0232- received answers from submitter on 3/18, expected to be complete by 3/27 P-19-0140- expected to be complete by 3/27	None
	None	None

Internal spreadsheets. PMN Dedicated eco team developed an internal spreadsheet for cases in progress based on the notifications we receive from other disciplines	Access database- easy to use visual interface to link spreadsheet of case priorities and notification system
Backlog folder filling tracked on HH Tracking table. SIFs distrubited via email by CCD. Receive emails from eco/fate/health or CCD for specific cases. Communication with other exposure assessor is important to determine whether they are already working on the case. Log information into a spreadsheet or look at various spreadsheets from CCD	Prefer to start with spreadsheet then move to Confluence/JIRA for a better designed process
Personal tracking system for incoming cases; Dedicated PMN tracking sheet for tracking follow-up cases for all engineers	Tracking mehcanism integrated into same spreadsheet with cases engineers are working on (one view with all relevant information, rather than tracking in one application and having case priorities for another)
Initial Review- NCR Product Assignments feature- linked to CBI email and PMN Assignment Form emailed to admin side My work feature in NCR and My Tasks feature in Outlook to keep track of case assignments SIF/DRM- coordinated between original assessors and members of the dedicated PMN Team. Engineer on rotation (EOR) follows up to see if original assessor can complete request and if not, EOR works on it and CCD PM is notified regardless	Use Views/Assignments in NCR to track all "Data Review Memo" product assignments by due date and status- allows CCD PMs and anyone else to identify overdue assingments and follow-up accordingly

Need a better system for communicating changes to a report after it has been "finalized" (ex. Cases that have been moved to IO review, but need some rework). A future tracking system should incorportate a notification system for cases that loop back like this
Better designed workflow spreadsheet that can be updated in Confluence/JIRA. NCR may be helpful, too, but don't believe all this info can be tracked in NCR.
Important for given assessor to confirm handoff, when completed, of the case with the next discipline in the workflow
Establish standard workflow that CCD PMs can follow when coordinating follow-up requests. CCD can further standardize DRM documents with headers for PMN Discipline work (Chemistry, Fate, Eco Hazard, HH Hazard, Engineering, Exposure, Eco Risk, HH Risk). When CCD issues a DRM, only include disciplines that can take action now- if revisions are needed downstream- notify other disciplines later (following workflow).

Need a better way to track if changes are made to cases after they have been "finalized" and what those changes are (case history)
Access Database tracking system may be helpful

Need for a centralized spreadsheet
Clearly defined workflow should be represented in spreadsheet
Start with spreadsheet to track, potential to then use Confluence or JIRA

Most cases that are currently being worked on should be complete by 3/27
Discipline-specific tracking sheet is currently used
Establishing a standard workflow to notify disciplines
New tracking system should make it easy for CCD PMs to follow up with cases
Tracking sheet similar to Ex. 6 Personal Privacy (PP)'s for the dedicated team could work for backlog team

Ex. 6 Personal Privacy (PP)	None (last case finished 3/20)	None currently, but may be assigned more through PMN dedicated team (until finalized direction received from [redacted] and Ex. 6 Personal Privacy (PP) about Dedicated vs Backlog team)
Human Health		
Ex. 6 Personal Privacy (PP)	P-18-0318 and P18-0098	None
	P-17-0292; P-18-0262; P-19-0131; P-18-0365/0366; P-18-0399/0400; P-18-0327; P-20-0025; P-17-0086; P-17-0259; P-18-0151; P-18-0351; P-19-0084; P-19-0083; P-18-0350; P-18-0178/0217/0218; L-19-0024; L-19-0019- time is limiting factor for work	None
CCD		
Ex. 6 Personal Privacy (PP)		

All SIFs tracked through D-PMN Tracking sheet. Coordinate with original assessor and dedicated team to work on cases. D-PMN engineer rotates throughout the week, which is fine when the primary route of a SIF is to the original assessor; however if backlog engineers are taking on all SIFs, engineers would ned a different approach so that the SIF load is balances across all backlog reduction engineers	Excel spreadsheet similar to the one used for the PMN Dedicated team
Either informed of a case assignment by Ex. 6 Personal Privacy (PP) Ex. 6 Personal Privacy (PP) or chooses case from the excel file called "human health tracker" in [redacted]s folder on J drive; case tracking has been done using the human health tracker ([redacted] sends updated excel file every week)	Tracking currently done via NCR, but sometimes cases need rework because updated reports are not used (there is a time gap between when reports are uploaded and the time that the reports are searched for)
Flag cases in an email, use a personal to-do list, and use the RAD/CCD tracking spreadsheet	Email and the RAD/CCD tracking spreadsheet
Keeps track of work being done by a particular reviewer. Will use the status of a Data Review Memo. If there is an issue that needs to be resolved or clarified, contacts Ex. 6 Personal Privacy (PP)	Use status/event history in NCR, but need a backup point of vontact(s) in RAD for those issues that cannot be resolved
Tracking system recently changed in CCD and it is difficult for PMs to know which assessor is working on their case	NCR- all SIFs have to be in NCR so this could also be a place for management and PMs to track cases and know who is working on the case. In addition, there should be a way for PMs and the RAD assessors to communicate directly, rather than go through management. Easier to track a few cases at a time than everything by one person.
Use "My PM Assignments" view in NCR to see list of cases and their day 90s. Use "My PM Summary Dashboard" in NCR to view and updated PM Comment Header and PM Comment fields for each case. Use header to keep track of where case is and use PM Comment for more detailed description of case status	For the short term, RAD could use the PM Comment text box to note where the case is. That wouldn't require any changes to NCR. We would have to check with CCD to make sure that the PMs are ok with writing in the box though.

Folder filling system has been working decently. Every discipline should go to one spreadsheet and enter initials and date when the respective report is completed
It would be helpful for each discipline assessor to send a notice to other disciplines (either the whole team or the designated member) saying that their report (fate, engineering, exposure, and/or human health) has been updated for some reason
One RAD/CCD tracking spreadsheet that all information is on; have weekly targeted list of cases to be completed and keep hair on fire interruptions to a minimum
Agreement on what will be updated in NCR that everyone can track and clear points of contact when issues need to be resolved
Identifying assignments (who really is working on each case), direct communication between PM and RAD assessor, and setting real deadline for work requested. RAD assessors should estimate how long it will take to completement the assignment. Not having an estimate of time required puts PMs in limbo and makes it difficult to track
If we had time/money to modify NCR we could add "RAD Comment field" and/or "RAD Comment Header" similar to the ones that the PMs use. Expand the PM Comment Header so that instead of "Awaiting RAD Action" it could say "Awaiting RAD Action-Engineering" or "Awaiting RAD Action- Human Health"

Communication across disciplines when changes are made to a case Targeted weekly case-list One centralized tracking spreadsheet
Currently it is unclear who the point of contact should be for a case Better communication between PMs and RAD assessors

Cell: B1
Comment: Ex. 6 Personal Privacy (PP)
List the backlog cases that you are currently working on (this is for RAD folks).
Provide the status of the case and an indication of when you will be done with the work, including challenges that you are facing

Cell: C1
Comment: Ex. 6 Personal Privacy (PP)
List the incoming cases (<90 days) that you were the original assessor and you are still working on (this is for RAD folks). Provide the status of the case and an indication if you can finish the case by Tuesday, March 24

Cell: D1
Comment: Ex. 6 Personal Privacy (PP)
Describe how you typically track cases assigned to YOU, and cases assigned to your discipline-specific team to distribute to others (I also want CCD insights—this request is not solely for RAD folks)

Cell: E1
Comment: Ex. 6 Personal Privacy (PP)
How do you want to track real updates to the case review process?

Cell: F1
Comment: Ex. 6 Personal Privacy (PP)
What changes can the team institute to make tracking easier and improve communications on where the case stands in the workflow process?